

U.S. DEPARTMENT OF THE INTERIOR



# Ordering Guide

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## Microsoft SharePoint Support Services BPA

**U.S. Fish & Wildlife Service**  
**Division of Contracting and Facilities Management**  
**4401 North Fairfax Drive, MS 7118-43**  
**Arlington, VA 22203**



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## Introduction

This guide contains the information needed to properly use the SharePoint blanket purchase agreement (BPA) to award a BPA Call responsive to the customer's requirements. It contains general information, instructions on placing BPA Calls, roles and responsibilities of key points of contact, how to prepare a proper requirements package for ordering and direction in initiating and managing BPA Calls. This document is applicable to all U.S. Department of the Interior (DOI, the Department) bureaus and individuals with delegated authority to award and administer BPA Calls against this agreement.

## General Information

### Scope of the SharePoint BPA

The objective of this BPA is to provide comprehensive SharePoint support services comprised of enhancing, upgrading and supporting SharePoint environments for all bureaus within the Department. Firm fixed price BPA Calls may be issued in accordance with this BPA for the following services: architecture design and implementation; architecture integration and testing; solution development, site administration and site design; and training. Use of this BPA is not mandatory, but is highly suggested to reduce procurement costs and streamline the acquisition process.

### Period of Performance

The BPA was awarded with a one-year base period on March 25, 2011, with four (4) one-year option periods, for a potential aggregate total performance period of five years. This applies for each of the two vendors signed into this agreement.

### Purchasing Limits

Prior to the initiation of a BPA Call, program offices are required to verify the remaining purchasing capacity.

#### "Not to Exceed Call"

The total funding for each BPA Call may not exceed \$500,000.00.

#### "Authorized Limit"

The total combined funding for all BPA Calls issued within the base year (and for each subsequent, exercised option year thereafter) may not exceed \$10,000,000.00. Upon reaching this limit, the BPA will expire and be terminated.

## Placing BPA Calls

### Authority to Issue BPA Calls

Any warranted Contracting Officer (CO) belonging to DOI, its bureaus or any of its offices may order against this agreement within their delegated warrant authority, provided it does not exceed the \$500,000.00 BPA Call limit. All COs seeking to place orders against this agreement consent to the terms and conditions set forth in the BPA. Once a BPA Call is administered under this agreement, a signed copy of the BPA Call must be submitted to the SharePoint BPA CO or Deputy SharePoint BPA CO:

**Michael Coghill**, Supervisory CO  
SharePoint BPA CO  
703-358-2288  
[michael\\_coghill@fws.gov](mailto:michael_coghill@fws.gov)

**Eileen Soto**, CO  
Deputy SharePoint BPA CO  
703-358-2012  
[eileen\\_soto@fws.gov](mailto:eileen_soto@fws.gov)

*(As previously mentioned, the above listed COs must be contacted prior to the initiation of a BPA Call to ensure limits are not exceeded.)*

A certified Contracting Officer Technical Representative (COTR) must be identified for each BPA Call. The SharePoint BPA COTR must be notified for each BPA Call COTR assigned:

**Lee Sutta**, Web Engineering and Support Team Lead  
SharePoint BPA COTR  
303-275-2323  
[lee\\_sutta@fws.gov](mailto:lee_sutta@fws.gov)

\*When placing an order against this agreement, both vendors must be notified and the resulting BPA Call must be competed amongst the two vendors:

**Clayton Cobb**, Director – Midwest Region  
Planet Technologies  
BPA Number: F11PA00022  
301-721-0100  
[ccobb@go-planet.com](mailto:ccobb@go-planet.com)

**David Tilghman**, VP – Federal Sales  
True Tandem  
BPA Number: F11PA00091  
443-831-1804  
[David.Tilghman@TrueTandem.com](mailto:David.Tilghman@TrueTandem.com)

### Using the FWS Contracting Office

For BPA Calls awarded by the U.S. Fish and Wildlife Service (FWS) on behalf of another bureau, funding must be provided through an intra-agency agreement form that includes a statement of work (SOW), an independent government estimate (IGE) based on prices established in the BPA, a financial division point of contact and a technical point of contact. The FWS Contracting Office will send the SOW to both vendors for a quote, and then issue the BPA Call if found fair and reasonable.

\*All non-FWS entities will be charged a 6% indirect cost for this service.

## Roles and Responsibilities

### SharePoint BPA CO

The SharePoint BPA CO has the overall responsibility for managing and administering the SharePoint BPA, as well as the following:

- Serving as a general informational point of contact for SharePoint BPA users
- Providing administrative procedures guidance for placing orders
- Monitoring base year and option year periods of performance
- Ensuring fair opportunity is given to both vendors

### BPA Call CO

The BPA Call CO is responsible for the following:

- Serves as the local contracting focal point for coordination and award of BPA Calls

- Ensures BPA Call requirements are within the SharePoint BPA scope, rates and terms
- Makes certain BPA Call request packages are properly prepared and provide all required information
- Coordinating BPA Call requests with the SharePoint BPA CO, or designated points of contact as required, in order to monitor and track purchasing limits
- Providing copies to the SharePoint BPA CO or Deputy SharePoint BPA CO of all BPA Calls awarded against this agreement
- Preparing vendor performance assessment reports as required

## COTRs

COs shall delegate authority to a COTR. This authority typically encompasses the following:

- Accomplish day-to-day surveillance of vendor performance
- Inform the CO of any potential performance problems
- Prepare and submit to the CO a written evaluation of the vendor's performance upon completion of a BPA Call as necessary
- Review invoices in comparison to actual performance accomplished

The BPA Call CO should consider the nomination submitted by the requiring activity that identifies a federal government employee who is technically qualified and trained to become a COTR.

## SharePoint BPA Vendors

Vendors under this agreement are responsible for the following:

- Submitting monthly summary reports to the respective COTR and CO that updates the status of all BPA Calls submitted and currently in progress
- Guaranteeing performance and deliverables meet the requirements set forth in the primary agreement and each consequent BPA Call
- Performing work and providing the services in accordance with the terms and conditions enclosed in the BPA
- Submitting proposals in accordance with the request from the ordering office

# The Requirements Process and Placing Orders

## BPA Call SOW

The SOW identifies and describes the customer's needs as accurately and thoroughly as possible, and addresses those needs with statements describing the required services, generally in terms of output. The SOW should not impose requirements that are not specifically required to ensure successful satisfaction of the BPA Call requirements. Requirements should be stated in clear, concise, easily understood and measurable terms. Detailed procedures should not be included that dictate *how* the work is to be accomplished; rather, the requirements should allow the vendor the latitude to work in a manner suited for innovation and creativity. At a minimum, the SOW should be organized in accordance with FAR 8.405-2(b), to include:

- Description of the work to be performed
- Location of work
- Period of performance
- Deliverable schedule (if applicable)
- Applicable performance standards
- Any special requirements (e.g. security clearances, travel, special knowledge, etc.)

## BPA Call IGE

The IGE is often prepared without a fully defined scope of work and is developed primarily for funding and budgeting purposes, as well as determining an estimated cost magnitude for the project. It also is not intended to be a comprehensive line item estimate, but should account for major cost elements and systems associated with each BPA Call.

## Ordering Procedures

The ordering CO may solicit responses to requirements from SharePoint BPA vendors in written form. A formal purchase request should be prepared and issued for each project requirement. The request and supporting documentation should clearly define the scope of the project. At a minimum, a properly formatted SOW and IGE should be included in the request package.

### 1. Purchase Request

This should be prepared by the program office and submitted to the ordering CO. It must include a SOW in accordance with FAR 8.405-2(b), an IGE, points of contact and any other supplemental documentation critical to the requirement.

### 2. Solicitation

Upon approval and receipt of the purchase request, the CO may then solicit to both vendors for a quotation. The solicitation package should include a cover letter with all applicable deadlines, points of contact (including the anticipated COTR), the SOW and any other applicable documents.

### 3. Proposing a Response

After receipt of a solicitation from the CO, the vendor will organize, coordinate and submit its proposal for review by the government (technical and contracting representatives). The vendor must submit its proposal within the time prescribed in the cover letter. The government may then begin reviewing timely responses.

### 4. Evaluations

The government will review all proposals and comment on them as necessary. The government also reserves the right to award BPA Calls without discussions. Once analysis is complete, the vendor's proposal may be accepted or rejected.

## BPA Call Administration and Monitoring

### BPA Call Administration

The SharePoint BPA CO is responsible for administration and management of the BPA setup. Under no circumstances shall any understanding, agreement, modification or any other action in deviation from the terms and conditions of the BPA setup be effective or binding upon the government. The SharePoint BPA CO, as well as the Deputy SharePoint BPA CO, are available to answer questions concerning planning and developing BPA Calls, review and approval procedures, and can provide overall guidance, oversight and general information regarding this agreement. All administration associated with individual BPA Calls will be performed by the CO issuing the BPA Call. Additionally, all official BPA Call files will be maintained at each ordering office.

## Monthly Summary Reports

Vendors shall provide monthly summary reports to the SharePoint BPA CO and the SharePoint BPA COTR. Reports shall address the status of all submitted BPA Calls and all currently being worked on. The report for each month is due no later than the close of business, the 7<sup>th</sup> day of the following month. Information should consist of:

1. A listing of ALL BPA Calls submitted and issued during the month, to include:
  - Ordering office/CO
  - BPA Call number and date issued
  - Bureau name
  - Facility/Location of work
  - Brief description of BPA Call work (in the event that the BPA Call spans multiple areas, select the task area that represents the preponderance of work)
  - Total amount ordered and obligated under each BPA Call, including any modifications
  - Period of Performance for each BPA Call
  - Scheduled percent complete and actual percentage completed
  - Concerns, problems encountered and how addressed
  - Future actions required by government
2. Cumulative amount of total dollars ordered and obligated to date on all BPA Calls
3. Cumulative amount of dollars ordered and obligated by bureau
4. A listing of all BPA Calls estimated and proposals submitted for, but not awarded

## Changes in Vendor Personnel

The vendor may not add personnel to an awarded BPA Call without prior authorization to do so. The vendor shall advise the ordering CO of personnel removals as they occur. The vendor may also replace personnel as necessary to meet unique requirements. Requests to modify personnel composition may be submitted to the ordering CO at any time.

## Performance Assessment Reports

In accordance with FAR 42.1502(b), "Agencies shall prepare an evaluation of contractor performance for each contract that exceeds the simplified acquisition threshold."

### For the BPA Setup

As required, vendor performance will be monitored and entered into the Contractor Performance Assessment Reporting System (CPARS). On each order meeting the simplified acquisition threshold (currently \$150,000.00), a vendor performance report will be generated in CPARS format and combined with all other orders into one CPARS report. This one CPARS report will record vendor performance at the agreement level covering all orders under the BPA.

### For BPA Calls

Therefore, at the completion of each BPA Call that exceeds \$150,000.00 the issuing CO shall complete a vendor performance report in the CPARS format and forward it to the SharePoint BPA CO or Deputy SharePoint BPA CO. Completed reports will be kept in the primary BPA file. The preparation and completion of these reports is the responsibility of the ordering CO, but should include input from the assigned COTR. All reports shall be submitted to the appointed SharePoint BPA COs within 15 days from contract close-out.

## BPA Call Management

In response to solicitation requests, the vendor shall either submit a proposal or written notification of a decline to bid. The proposal shall describe the technical approach, organizational resources and management controls to be employed to meet the cost, performance and schedule requirements of each BPA Call throughout its execution.

## Solicitation Feedback

Upon written request by the vendor, a debriefing may be given to the unsuccessful offeror. During the debriefing, feedback should discuss what was required and expected of the vendor and if those expectations were met. Debriefings may be conducted orally, in writing or by any other method deemed appropriate by the ordering CO. In accordance with FAR 15.505(e), applicable feedback material that may be covered includes:

- The agency's evaluation of significant elements in the offeror's proposal
- A summary of the rationale for eliminating the offeror from the competition
- Reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations and other applicable authorities were followed in the process of eliminating the offeror from the competition

## Invoicing and Payment

For BPA Calls awarded by the FWS contracting office headquarters (Region 9), all invoices must be e-mailed to the COTR and SharePoint BPA CO or Deputy SharePoint BPA CO. The COTR must review and approve/reject the invoice. The CO may then review the invoice upon approval from the COTR. Once invoice processing has been recommended, the invoice will be transmitted to the appropriate budget analyst for payment. For BPA Calls awarded by other FWS regions or other DOI bureaus, invoicing instructions shall be provided with each BPA Call issued.